

# **SiteManager** **Training Manual**



Module A  
Chapter 1

**Contract Administration**  
**Reference Tables**

Section A-1-1-a

## **Initiating a Contract**

Student's Version

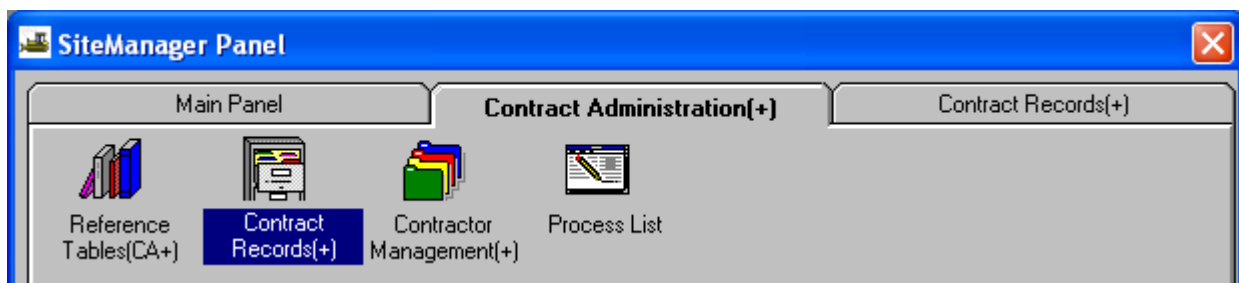
Indiana Department of Transportation  
March 2009, Version 3.9a

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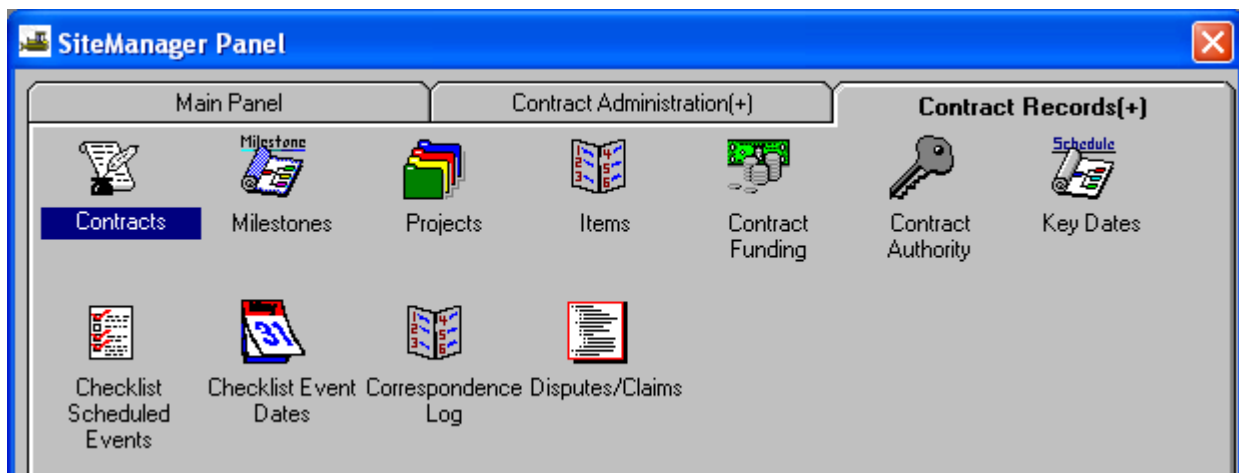
# Initiating a Contract in SiteManager



“Double-click” on **Contract Administration(+)** located on the Main Panel.



“Double-click” on **Contract Records(+)**.



“Double-click” on **Contracts**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts** Open

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID:  INDOT Fed St/Pr Proj Nbr:

Status: Pending

District:  Area:

Progress Sched:  Variance Pct:  .00

Desc:

Time Charges:  Bid Days:  Bid Amt:  \$0.00

Contract Type:  Spaces

Work Type:  Spaces

Spec Yr:  Unit System:  Suppl Spec Bk Yr:  Alt ID:

Proposal Fund Type:

Funding  
☐ Federal  
☐ State/Province  
☐ Both

Fed Oversight  
☐ Fed Oversight  
☐ Local Oversight

Wage Decision: Wage Decision ID Wage Decision Description Genrl Wg Dcsn ID

“Click” on the **Open**  button located on the toolbar.

**Select Contract**

Selection  
 Contract ID R-90007

Find:

Contract ID

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Loca
R-90002	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT 0A
R-90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT 0A
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT 0A
R-90005	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT 0A
R-90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT 0A
R-90007	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT 0A

A list of the contracts in SiteManager is listed. Use the Filter/Find/Sort techniques to locate the appropriate contract. “Double-click” on the appropriate **Contract ID**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90007 INDOT Fed St/Pr Proj Nbr: STP 3387005

Status: Active

District: 660 Area:

Progress Sched:  Variance Pct:  .00

Desc: INTERSECTION IMPROVEMENT AND TRAFFIC SIGNAL MODERNIZATION

Time Charges: WORK DAYS Bid Days: 70 Bid Amt: \$658,493.35

Contract Type: INTERSECTION IMPROVEMENT

Work Type: INTERSECTION IMPROVEMENT

Funding  
☐ Federal  
☐ State/Province  
☒ Both

Fed Oversight  
☐ Fed Oversight  
☐ Local Oversight

“Click” on the Generic Fields  button located on the toolbar.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: 90002 **INDOT**

Program Budget Manager: Mona Funds

Project Manager: Penelope Mannington

Design Firm: Designs are Us

CNDT59 - Letter Date of FA Letter: 00/00/00

**Additional Contract DBE Data**

	DBE	MBE	WBE
Goal Percent:	6	12	12
Original Commitment Amount:	\$123,456,789.12	\$123,456,789.12	\$123,456,789.12
Actual Ending Amount:	\$123,456,789.12	\$123,456,789.12	\$123,456,789.12

(IN) User Working on Process: abcd

Date Cleared: 12/12/12

Compliance Indicator: abcd

Date 30 Day Notice Letter is Sent: 12/12/09

“Click” on the **Generic Fields** icon located on the toolbar.

- **Program Budget Manager:** The name of the Program Budget Manager assigned to the contract. “Enter” the name of the Program Budget Manager in the Program Budget Manager field.
- **Project Manager:** is the name of the Project Manager for the Contract. Specific messages and reports are sent to this person by the system. “Enter” the name of the Project Manager in the Project Manager field.
- **Design Firm:** is the name of the firm that designed the contract. “Enter” the name of the firm who designed the contract in the Design Firm field.
- **CNDT59 – Letter Date of FA Letter:** Final Acceptance letter date. To be completed at a later date.
- **Goal Percent:** The goal set for the contract at time of letting for **DEB, MBE and WBE**. “Enter” the appropriate percent for MBE and WBE if appropriate.
- **Original Commitment Amount:** The amount that the contractor listed on their Affirmative Action Certification in their bid, they were committing to pay the DBE sub. “Enter” the Original Commitment amount, if applicable.
- **Actual Ending Amount:** The amount that the contractor actually paid the sub. To be entered at the end of the contract.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**  
Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90002 **INDOT**

Program Budget Manager: Mona Funds

Project Manager: Penelope Mannington

Design Firm: Designs are Us

CNDT59 - Letter Date of FA Letter: 00/00/00

**Additional Contract DBE Data**

	DBE	MBE	WBE
Goal Percent:	12	12	12
Original Commitment Amount:	\$123,456,789.12	\$123,456,789.12	\$123,456,789.12
Actual Ending Amount:	\$123,456,789.12	\$123,456,789.12	\$123,456,789.12


(IN) User Working on Process: abcd

Date Cleared: 12/12/12

Compliance Indicator: abcd

Date 30 Day Notice Letter is Sent: 12/12/09

- **(IN) User Working on Process:** the person who is working on the review of the final.
- **Date Cleared:** that date that the DBE Utilization letter was written and sent to Contract.
- **Compliance Indicator:** the indicator for final review to know the status of the utilization, whether P for partial, Q for quantities or X for non-compliance.
- **Date 30 Day Notice letter is Sent:** the date the letter of notification to the contractor that they have 30 days to submit DBE-#, MBE/WBE-3 forms.

“Click” the **Generic Fields**  button located on the toolbar to close the Generic Fields.

“Click” the **Save**  button located on the toolbar.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Save

Description Location **Payment Data** Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: 90008 Current Contract Amt: \$658,493.35

Generate Est1 Day: 8 Contract Limit Amt: \$0.00 Liquidated Dam Rate Amt: \$1,100.00

Generate Est2 Day: 22 Contract Limit Pct: .00

☐ Auto Liquidated Dam

☐ Price Adjmnt Ind

**RETAINAGE**

☐ Securities Allowed ☐ Retain Stkipiled Ind ☒ Unlimited Escrow Max Escrow Amt: \$0.00

**Retainage Changes:**

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	08/17/06	.00	CURRENT A	.00	\$0.00	\$0.00	.00	CURRENT A

“Click” on the **Payment Data** tab.

If there is retainage or escrow on the contract, then add the following information to the entry in the **Retainage Changes** panel:

**Effect Date:** The **Effective Date** is the date the corresponding retainage percentage begins. “Enter” the Notice to Proceed date for the **Effect Date** field.

**Pct:** The **Percent** is the retainage percentage to be applied to the Contract. “Enter” the Retainage Percentage in the Pct field.

“Click” the **Save**  button located on the toolbar.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Save

Description Location Payment Data **Critical Dates** Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90008

Critical Date Description	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	N	N
Award Date	02/16/05	N	N
Price Adjustments Base Date	00/00/00	N	N
Execution Date	02/16/05	Y	N
Letting Date	02/16/05	N	N
Original Completion Date	00/00/00	N	N
Checked Out to Field Date	00/00/00	N	N
Substantial Completion Date	00/00/00	N	N
Contractor Bankruptcy Date	00/00/00	N	N
Contractor Default Date	00/00/00	N	N
<b>Notice to Proceed Date</b>	00/00/00	Y	N
Signed Date	00/00/00	N	N
First Day of Work	00/00/00	N	N

Critical Date Description: Notice to Proceed Date

Actual Occurrence Date: 03/02/05 ☒ Required to Activate ☐ Required to Finalize

Distribution List: Recipient ID:

Message Text:

“Click” on the **Critical Dates** tab.

**Critical Date Description:** “Click” on the **Notice to Proceed Date** description.

“Click” in the bottom panel. Verify the **Critical Date Description** is **Notice to Proceed Date**.

**Actual Occurrence Date:** “Enter” the **Notice to Proceed** date in the **Actual Occurrence Date** field.

“Click” on the **Save**  button located on the toolbar.



**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts** Save

Description Location Payment Data Critical Dates **Primary Personnel** Prime Contractor DBE Commit Training Plan

Contract ID: R-90008 **INDOT**

PE/S: d90afaul Fault, Ash

Area Engineer: d90ffarm Farmer, Frank

Contract Designer: Miguel Lorenzo

Contract Created By: SYSTEM

Notification Recipients  
Contract Status Changed to Active:  
User ID: Distribution List:

Work Progress Behind Schedule  
User ID: Distribution List:

Civil Rights Exception Report Generated:  
User ID: Distribution List:

“Click” on the **Primary Personnel** tab.

**PE/PS:** PE/PS is the names of the Project Engineer/Project Supervisor for the Contract. Specific messages and reports are sent to this person. “Enter” the name of the Project Engineer/Supervisor in the PE/PS field.

**Area Engineer:** The **Area Engineer** is the name of the Area Engineer whom the contract is assigned. “Enter” the name of the Area Engineer in the **Area Engineer** field.

**Contract Designer:** **Contract Designer** is the name of the person that designed the Contract. “Enter” the name of the Contract Designer in the Contract Designer field.

“Click” the **Save**  button located on the toolbar.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Delete

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90008

Current Prime: 99-9999977 BIG JOHN COAL CO ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 00/00/00 Bankruptcy Type Desc: Spaces

Defaulted: ☐ Indicator Reason: Spaces Date: 00/00/00

Original Prime Contractor:

**Prime Contacts:**

Contact Name	Contact Type	User Id

**Prime Associates:**

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000001	Surety Place Holder	Surety
00-0000002	Insurance Place Holder - See Tms*port	Insurance

“Click” on the **Prime Contractor** tab.

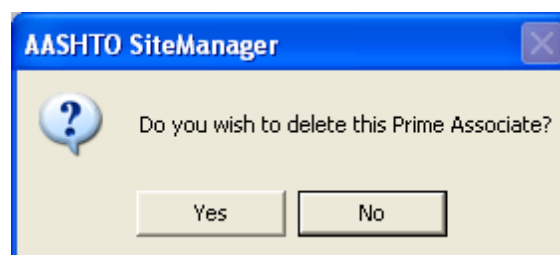
**Prime Associates:** **Prime Associates** lists the Surety company for the Prime contractor.

“Click” in the **Prime Associates** panel.

“Click” on the **Associate Short Name** entry for **Surety Place Holder**.

**Note:** the surety place holder is a dummy and was put in the field just to make the contract Active. This dummy must be deleted and the appropriate information must be entered

“Click” the **Delete**  button located on the toolbar.



“Click” **Yes**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts** New

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90008  
Current Prime: 99-9999977 BIG JOHN COAL CO ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 00/00/00 Bankruptcy Type Desc: Spaces

Defaulted: ☐ Indicator Reason: Spaces Date: 00/00/00  
Original Prime Contractor:

Prime Contacts:

Contact Name	Contact Type	User Id
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Prime Associates:

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000002	Insurance Place Holder - See Trns*port	Insurance

“Click” in the **Prime Associates** panel.  
 “Click” the **New** button located on the toolbar.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90008  
Current Prime: 99-9999977 BIG JOHN COAL CO ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 00/00/00 Bankruptcy Type Desc: Spaces

Defaulted: ☐ Indicator Reason: Spaces Date: 00/00/00  
Original Prime Contractor:

Prime Contacts:

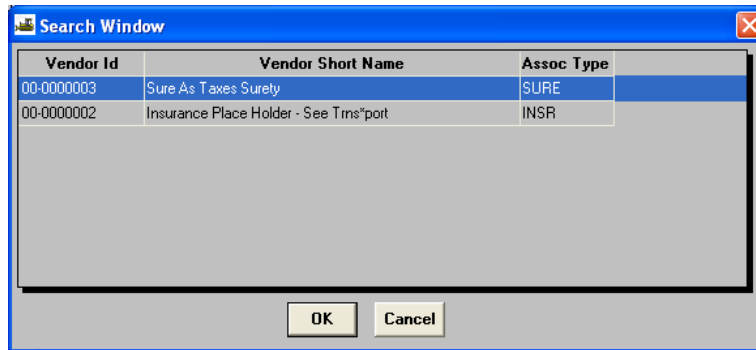
Contact Name	Contact Type	User Id
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Prime Associates:

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000002	Insurance Place Holder - See Trns*port	Insurance

Search  
Filter Search  
Filter  
Find  
Sort  
Show Filter/ Sort

“Right-click” in the **Assoc Vendor ID** field. “Click” on **Search**.



Use the Find/Filter/Sort technique to locate the appropriate Surety Vendor.  
 “Double-click” on the appropriate **Vendor ID**.

**Note:** If the surety company is not available, then the Surety Company will need to be associated to the Prime Contractor in the Vendors window prior to this step. Refer to 11 of this document for steps for associating the surety to the prime contractor.

**Note:** If the Surety company is not in the Vendor window, then notify the Prequalification Unit that the vendor needs to be added in Trans\*port. After the vendor has been added, notify the SiteManager System Administrator that a Vendor Reference Load needs to occur.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Save

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90008

Current Prime: 99-999977 BIG JOHN COAL CO ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 00/00/00 Bankruptcy Type Desc: Spaces

Defaulted ☐ Indicator Reason: Spaces Date: 00/00/00

Original Prime Contractor:

**Prime Contacts:**

Contact Name	Contact Type	User Id
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**Prime Associates:**

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000002	Insurance Place Holder - See Trns*port	Insurance
00-0000003	Sure As Taxes Surety	Surety

If the Prime Contractor has selected to use an Escrow agent, repeat steps beginning on page 9 to associate an Escrow Agent in the Prime Associates panel.

“Click” the **Save**  button located on the toolbar.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Close

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90008

Current Prime: 99-9999977 BIG JOHN COAL CO ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 00/00/00 Bankruptcy Type Desc: Spaces

Defaulted: ☐ Indicator Reason: Spaces Date: 00/00/00

Original Prime Contractor:

Prime Contacts:

Contact Name	Contact Type	User Id

Prime Associates:

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000002	Insurance Place Holder - See Trms*port	Insurance
00-0000001	Surety Place Holder	Surety

“Click” the **Close**  button located on the toolbar.

## A-1-1-a Group Exercise

Contract R -90009 is ready to be initiated.

Log onto SiteManager as: update

Password: pass

“Double-click” **Contract Administration** (+) icon.

“Double-click” **Contract Records** (+) icon.

“Double-click” **Contract** icon.

“Click” on the **Open** button on the toolbar

“Double-click” **Contract ID:** R -90009

“Click the **Generic Field** button located on the toolbar.

“Enter” the **Program Budget Manager** Doloris N. Sents

“Enter” the **Project Manager** Oliver Versee

“Enter” the **Design Firm** Designs R Us

“Enter” the **DBE Original Commitment Amount** \$1,000,000

“Click” the **Generic Field** button located on the toolbar.

“Click” Save

Click the **Primary Personnel** tab

“Select” the **PE/S** Skip P. Nutt

“Select” the **Area Engineer** Frank Farmer

“Enter” the **Contract Designer** Desmond Gnermond

“Click”: Save

“Click” on the **Prime Contractor** tab

“Click” on Surety Place Holder in the **Prime Associates** panel:

“Click” the **delete** button located on the toolbar

“Click” the **New** button located on the toolbar

“Right click” in the Assoc Vendor ID field to Search for Sure as Taxes Surety

“Double-click” Sure as Taxes Surety

“Click” the Save button located on the toolbar

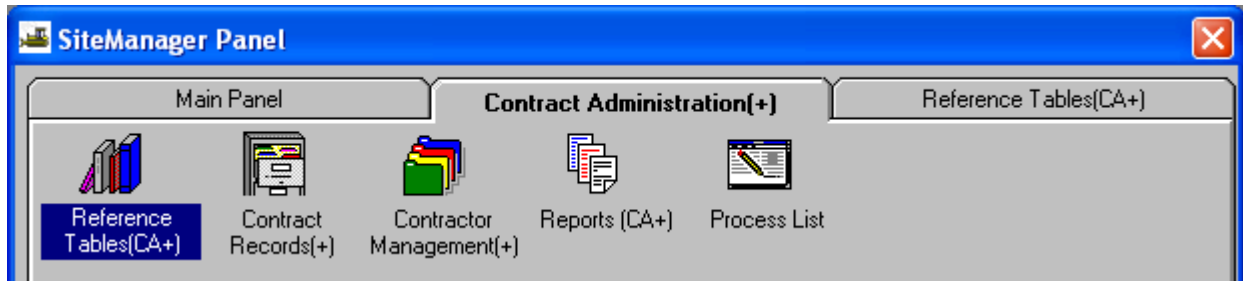
“Click” the Close button located on the toolbar

## Associating a Surety Company to a Vendor

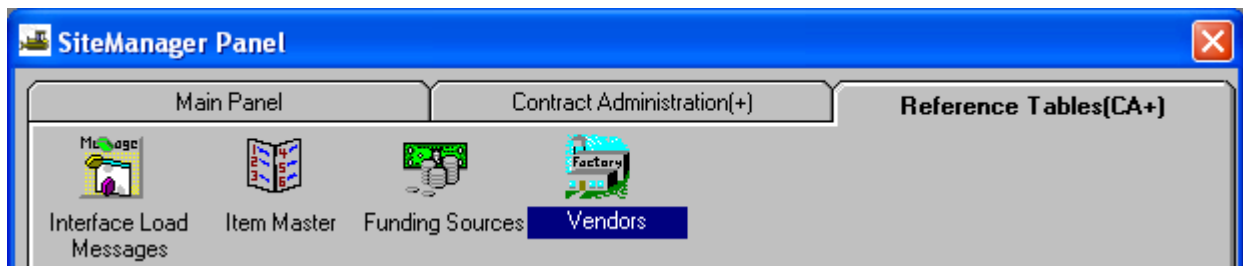
This section of the document will explain how to associate a surety company to a vendor.



“Double-click” on the **Contract Administration** icon located on the Main Panel.



“Double-click” on **Reference Tables**.



“Double-click” on **Vendors**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Vendors** Open

Description Work Classes Affiliates Personnel Prime Contacts Associates Security Accounts Securities Usage

Vendor ID:  IRS Tax Nbr:

Short Name:

Full Name:

Vendor Type:  Alt Vendor ID:

DBE Type:  Cert Type:

Cert Date:  Cert End Date:

Corp Type:  Corp State:

Prequal Date:  Prequal End Date:

Uncompleted Work Amount:  0.00 ☐ Preconstruction Indicator ☐ Obsolete Ind

Ethnic Group:  Gender:

“Click” the **Open** button located on the toolbar.

**Vendor Pick List**

Selection

Find :  99-9999955

Vendor

Vendor Id	Vendor Short Name	Vendor Type
99-9999955	TAKEN DOWN CONSTRUCTION	PREQUALIFIED CONTRAC
99-9999966	PAVE'UM RIGHT CO	PREQUALIFIED CONTRAC
99-9999977	BIG JOHN COAL CO	PREQUALIFIED CONTRAC
99-9999988	COVER ALL HOLES CO	PREQUALIFIED CONTRAC
99-9999999	BLACK SIDE UP PAVING	PREQUALIFIED CONTRAC
AF-8585858	AFFILIATE CO.	COMMERCIAL CONTRACT
AF-8585859	AFFILICATE INC.	COMMERCIAL CONTRACT

Use the filter, find or sort technique to locate the appropriate Vendor ID of the Prime Contractor. The Vendor ID of the Prime Contractor is located on the Prime Contractor tab of the Contracts window.

“Double-click” on the appropriate **Vendor ID**.



**AASHTO SiteManager**  
File Edit Services Window Help

**Vendors**  
Description Work Classes Affiliates Personnel Prime Contacts Associates Security Accounts Securities Usage

Vendor ID: 99-9999955 IRS Tax Nbr: 99-9999955  
 Short Name: TAKEN DOWN CONSTRUCTION  
 Full Name: TAKEN DOWN CONSTRUCTION  
 Vendor Type: PREQUALIFIED CONTRACTOR Alt Vendor ID:  
 DBE Type: Spaces Cert Type: Spaces  
 Cert Date: 00/00/00 Cert End Date: 00/00/00  
 Corp Type: CORPORATION Corp State: IN  
 Prequal Date: 12/03/05 Prequal End Date: 12/02/06  
 Uncompleted Work Amount: 1,316,987.00 ☒ Preconstruction Indicator ☐ Obsolete Ind  
 Ethnic Group: Spaces Gender:

The **Vendors** window opens. “Click” on the **Associates** tab.

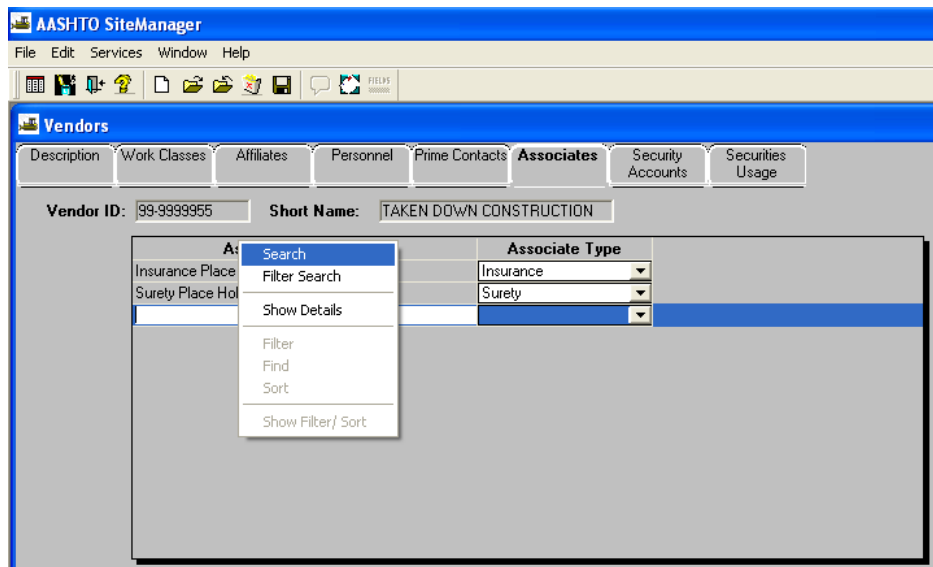
**AASHTO SiteManager**  
File Edit Services Window Help

**Vendors** New  
Description Work Classes Affiliates Personnel Prime Contacts **Associates** Security Accounts Securities Usage

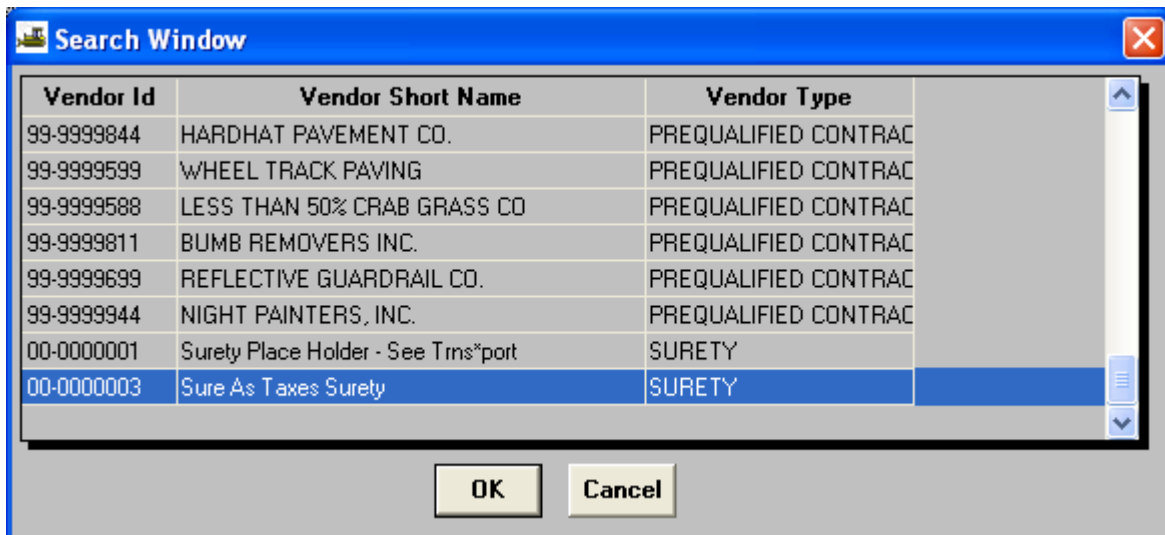
Vendor ID: 99-9999955 Short Name: TAKEN DOWN CONSTRUCTION

Associate Short Name	Associate Type
Insurance Place Holder - See Trans*port	Insurance
Surety Place Holder	Surety

“Click” the **New** button located on the toolbar to create a new entry.



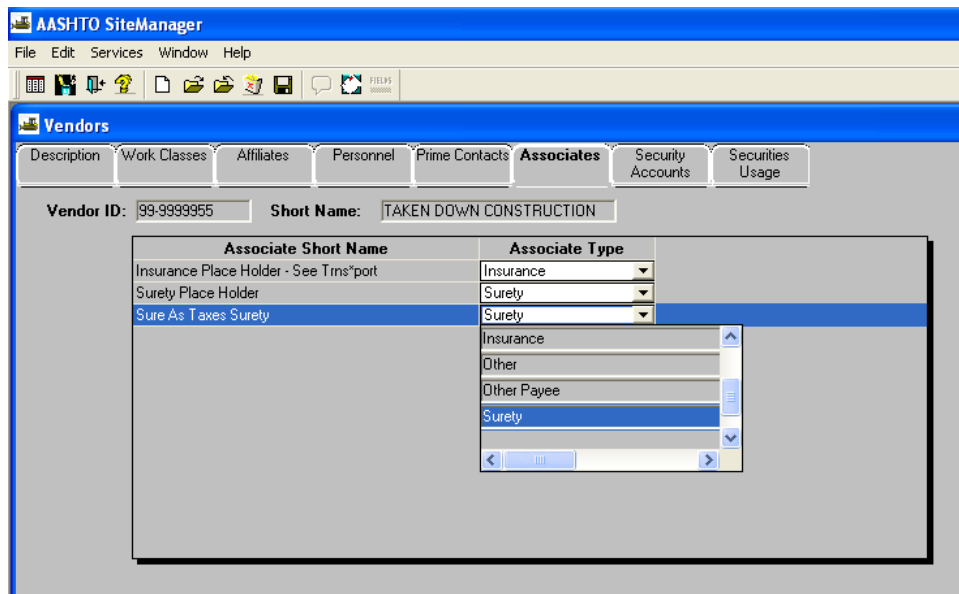
Associate Short Name: Associate Short Name is the short name for an Associate of the Vendor.. “Right-click” in the Associate Short Name field. “Click” **Search**.



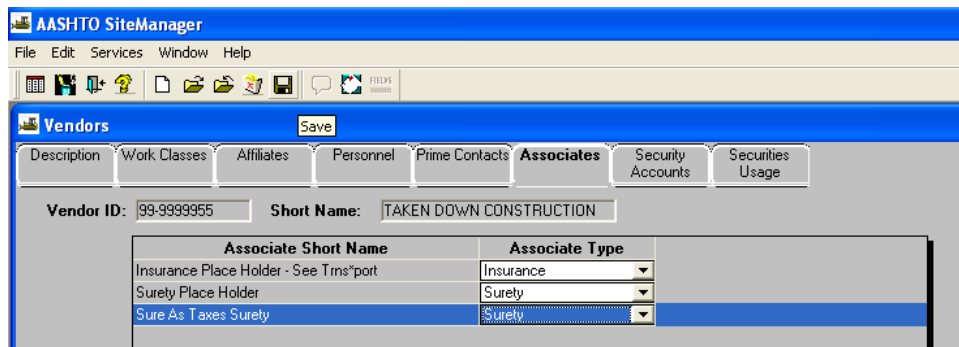
Use the filter, find or sort technique to locate the appropriate surety or escrow company.

Note: Vendor Type for a Surety company is SURETY.

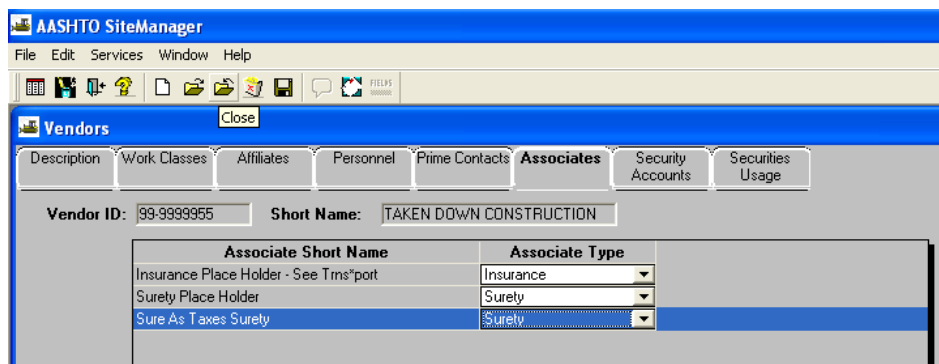
“Double-click” on the appropriate **Vendor Short Name**.



**Associate Type:** Associate Type is the type of vendor associate. “Click” on Surety.



“Click” the **Save**  button located on the toolbar.



“Click” the **Close**  button located on the toolbar.

## **A-1-1a Group Exercise**

### **Associating a Surety Company to a Vendor Exercise**

“Double-click” **Contract Administration**

“Double-click” **Reference Tables.**

“Double-click” **Vendors.**

“Click” the **Open** button located on the toolbar.

“Scroll” and locate the **Vendor Short Name** for TOM & JERRY YARD SERVICES

“Double-click” on TOM & JERRY YARD SERVICES

“Click” on the **New** button located on the toolbar.

“Right-click” over the **Associate Short Name** and **Search.**

“Double-click” on the **Vendor Short Name** for Sure As Taxes Surety

“Click” the dropdown arrow and “click” on Surety.

“Click” the **Save** button located on the toolbar.

“Click” the **Close** button located on the toolbar.